

Montana Shared Catalog Frequently Asked Questions (FAQ's) and Answers

Q: What's the primary value of being a MSC library?

A: By working in partnership with other MSC libraries, you will have the opportunity to more efficiently provide higher value services and better quality content to *your library's users*.

Q: Who is the Montana Shared Catalog?

A: The Montana Shared Catalog is a voluntary consortium comprised as of 164 libraries and branches. MSC libraries are found in 89 Montana communities, serving a combined population of approximately 550,000 and over 400,000 registered users.

The MSC currently includes five academic libraries, 80 public libraries or public library branches, 67 school libraries, and twelve special (law, medical, government, museum) libraries, stretching across the state from Troy to Ekalaka and Plentywood to Dillon.

Q: Where are these libraries located?

A: 102 are in Western Montana (61%), 27 in Central Montana (17%), 21 in Eastern Montana (13%), and fourteen (9%) on the Hi-Line.

There are several other shared catalogs in Montana: OMNI headquartered at MSU, the University of Montana and Affiliated Libraries headquartered at UofM, and the Kalispell, Billings, and Great Falls public school districts.

Q: How many librarians are employed in MSC libraries?

A: Over 400. MSC librarians work together on MSC-related issues; in many ways you are gaining a large virtual staff at the same time as you and your staff becomes part of the consortium.

Q: Who, actually, is driving the MSC?

A: MSC support staff located in the State Library work to make the MSC the best shared online library catalog it can be. Having said that:

- Policies and By-Laws are set by the MSC Executive Committee, with approval by the membership and in partnership with the State Library.
- Budgets are prepared by the MSC Director and submitted to the MSC Executive Committee for review and then discussed and voted on by the membership during their Spring membership meetings.
- MSC Staff provide training and ongoing support. MSC members can and are expected to provide assistance and training to new members. Members providing this training will have travel expenses reimbursed by the MSC.
- Decisions about implementation details (cataloging, circulation, look-and-feel, etc.) are made by the MSC Content Management Committee. The MSC membership has final approval.

Q: What application and computer hardware does the MSC run on?

A: We use [SirsiDynix Corp.'s Symphony](#) integrated library system (ILS). The software is state-of-the-art and is routinely updated with fixes and enhancements. The patron or student uses the online, web-based interface called "e-Library" or (OPAC). Users can also access the MSC through the statewide library resources interface with the EBSCO Discovery System (EDS) at <http://mtslr.org>. Library staff have a workstation based client called "Workflows" that interacts with the Helena based servers. Director's Station™ is a web-based application that runs on its own server, allowing library directors and staff to query the system's history logs for statistical information on circulation, cataloging, acquisitions and user activity.

The "production" system and catalog server runs on an IBM p520 Express (AIX) server with attached, external, high-speed SCSI data storage. The "development" and test server is an IBM p650 and is attached to a storage area network (SAN) for data storage. A run-time version of Oracle is the database underlying the Symphony ILS application. The Director's Station server is a Dell PowerEdge 6850 that is also attached to the SAN for data storage. It runs on the Windows Server 2003 operating system with Microsoft Sequel Server 2005 database. All servers are accessed thru the state's wide area network and are connected to redundant battery and emergency generator backup.

The MSC server and data communications environment is designed to be as industrial strength (in terms of speed, reliability, robustness, and recovery in the event of a problem) as we can afford to make it. This costs money and requires a fair amount of expertise to maintain and operate. We believe we have that expertise in partnership with the State Library's IT Department and with the state's Information Technology Services Division (ITSD). All system hardware is hosted in the server room of the Montana State Library.

Q: Who fixes the MSC when it breaks?

A: MSC Support staff monitors the system and fixes stuff when it's broken, and tweaks stuff when it's not. Your library won't need on-site staff people to keep your staff interface and online catalog functioning. The servers are housed and maintained in the State Library in Helena. If the MSC Staff can't resolve software problems, they have direct line, priority access to the vendor's customer support department. The server equipment is under warranty with IBM and our maintenance contract with them guarantees 24/7 access to their support personnel.

Our goal is that the MSC is available to your staff and users, except for scheduled downtime for upgrades, large record loads, and maintenance.

For scheduled and unscheduled downtimes MSC libraries have access to the Symphony system's Offline feature, to circulate materials if the server becomes unavailable.

The system's up and down times are tracked and are available at

[http://msl.mt.gov/For Librarians/Montana Shared Catalog/Members/incidentdisplay.asp](http://msl.mt.gov/For_Librarians/Montana_Shared_Catalog/Members/incidentdisplay.asp)

You may need on-site staff people to keep your local area network running smoothly and your workstations and related peripheral equipment online.

Q: Why should my library join? What's the best part of being a MSC consortium member?

A: The good company you keep and what it lets you do for your patrons and students. Membership in the consortium is a great opportunity for Montana libraries to improve their quantity, type and quality of library materials and services through collaboration and cooperation.

Some MSC members have formed "Partner" sharing groups that not only share their patrons and collections, but also work together in ways that help each other stretch their materials purchasing budgets. Perhaps most significantly, MSC members share their smarts and imagination—can you imagine having over 400 brains to pick when you have a problem or a bright idea?

Q: What are some of the drawbacks of being part of the MSC?

A: Once you join the MSC, the library has made a long-term commitment. The expense of exiting the MSC is fairly substantial and would be borne by the library requesting to do so.

You share your library's catalog with over 160 other libraries. It has to work for all. Working in a consortium requires that you and your library commit to communicating with other MSC members, to making operational and financial compromises, and to occasionally sharing in the consequences of decisions that lack immediate benefit for your library.

Q: How is the MSC financed?

A: Currently, 75% of the annual operational funds come from member libraries. The other 25% is provided from the state general fund. The State Library provides start-up financial assistance to libraries joining the MSC, hosts the servers and staff workspace, and pays the salaries of 2.66 operational staff. The other 1.33 staff salary is paid by the membership.

Q: What is the MSC budget?

A: The current MSC budget is available at http://msl.mt.gov/For_Librarians/Montana_Shared_Catalog/Members/Budget/budget.pdf

Q: Is there a MSC business plan?

A: The *MSC Business Plan* details MSL's history and future plans and is currently undergoing review and will be posted on the MSC website by November 1, 2013.

Q: How are MSC-related decisions made?

A: Consortium members make every effort to reach decisions by consensus, in the spirit of cooperation. In the event that consensus does not occur, a 75% majority of the membership present at a membership meeting or voting electronically is required. The MSC Executive Committee and the Content Management Committee attend to operational and procedural decisions, and present suggestions to the membership for approval. The Montana State Library Commission makes some funding decisions, with advice from the State Librarian and the Network Advisory Council.

Your library, regardless of size or type, has an equal voice in all the policy and financial decisions affecting the consortium.

Q: How much does it cost to join the MSC?

A: Start-up costs range from \$6,500 for small, un-automated libraries to many times this figure for large, already-automated libraries. Montana-specific start-up costs have been negotiated with SirsiDynix, toward the goal of making the MSC affordable for all but the very smallest of Montana's libraries. A competitive MSC-start-up assistance program helps libraries afford the initial license and data-related expenses of joining the MSC. Start-up costs not associated with direct vendor costs such as; peripheral equipment (receipt printers, barcode scanners and/or barcodes) and new library training are paid by the library and included in the start-up cost estimate. The MSC Director will supply your library with two cost estimates: a start-up and an ongoing cost estimate.

The MSC is a bargain if you compare the costs of being a MSC library with running your own system. The initial and ongoing out-of-pocket and capital costs, combined with the time it takes to run a local system, and the value of librarians' time spent on computers instead of users, all add together to make owning your own system an expensive proposition.

A careful accounting reveals that the costs of being a MSC member are equal to or less than the costs for having a standalone microcomputer-based catalog and circulation system.

Q: What is the annual cost of remaining a MSC member library?

A: Annual ongoing costs range from \$700 to more than \$25,000 for the largest libraries. Contact the MSC Director for an estimate of your library's anticipated costs. MSC membership requires enrollment in OCLC which is an additional annual cost for the library if they are not already enrolled.

All libraries pay as little as possible, given the costs of running the MSC. Libraries with larger collections, more users and higher yearly circulations pay more than libraries with smaller title, user and circulation counts. The smallest libraries receive an additional title, patron and cost share break.

Our intent is to use a measure that equitably distributes the consortium's annual costs among MSC libraries, based on the record counts taken from the system on March 1, each year.

Q: What are the consortium's typical ongoing costs, and how much will they be in future years?

A: The consortium's typical ongoing costs include SirsiDynix software licensing, maintenance and support, e-Library content, Director's Station licensing, hardware maintenance, test server support, authority maintenance, catalog cleanup, server room location costs, server replacement cost, training, meeting and conference costs and 1.66 of the cost of two MSC assistant staff positions. The total shared costs for FY2013 were \$345,121. Ongoing costs can be expected to increase by approximately 3% yearly. The state also provides nearly \$100k per year to the MSC to help reduce the amount of shared costs.

Q: How is the ongoing cost figured?

A: A library's individual contribution to the ongoing costs of the MSC is determined by group consensus; every library has an equal vote. MSC's primary concern is to keep prices fair and affordable for all participating libraries (big and small, but taking special care to keep smaller libraries enfranchised), while meeting its financial obligations.

The MSC ongoing cost formula is based on four measures. Those measures are: title (30%), circulation (10%) and patron (30%) counts that come directly from the system. The remaining 30% is divided equally among libraries. Title, user and circulation record counts are done by system administrators on March 1 each year in order to create the next fiscal year's ongoing cost formula. Member libraries are invoiced by mid-May of each year.

The following breaks are included:

- i. Title record break – libraries with under 10,000 titles records receive a 5,000 title break
- ii. Patron record break – libraries with under 3,000 patron records will not be charged for patron records
- iii. Equal share of 30% - libraries with under 8,000 title records AND under 1,000 patron records will pay a lower percentage that equals 1% of the 30%. The other libraries share the remaining balance equally.

The price structure strives to provide all libraries with a good deal, but takes exceptional care that it doesn't price large, medium or small libraries out of the catalog. It is a delicate balance that is annually reexamined by the group.

Q: How is the MSC staffed?

A: Federal funds pay for the MSC Director position and an Information Specialist position. The MSL Commission has agreed to split the cost of an additional position with the MSC membership. That position is the MSC Systems Support Technician. This person provides operational support to existing members, and has primary responsibility for adding new MSC members. A second operational support and training technician is training is fully funded by the MSC membership.

Staff from member libraries often work with one-another to solve problems, and on occasion, train and assist staff at other member libraries. While they are not MSC or State Library paid staff, their voluntary contributions are a vital part of the mix.

Q: Can libraries form sub-groups within the MSC?

A: Yes. Public libraries with branches present a system-wide catalog to their users. County-wide systems present a multi-type 'visage' to their users. School and agency libraries have the option of displaying their district's holdings as their default catalog.

Twenty-seven libraries are part of the "MSC Partner" sub-group and another eleven are part of the "MSC 4 Rivers" sub-group while five others make up the BridgerNet sub-group. These sub-groups share their collections and patrons, and stitch their partnership together with special system configuration and whatever courier/delivery services that can be arranged. The Partners and BridgerNet groups also offer floating collections of new fiction, popular fiction, audio and video recordings to their patrons. These items remain on the receiving library's shelf until needed elsewhere, giving the local libraries a "new" set of materials to offer their users on a rotating basis. This has made their patrons very happy.

Q: Must we join the MSC Partners, MSC 4 Rivers, or BridgerNet libraries when we join the MSC? Can we join these libraries later?

A: You need not join a sub-group when you join the MSC. If you decide you wish to join a group or groups later, your library must explore this first with the sub-group. Libraries are encouraged to inquire about joining any of the sharing groups, but they should know beforehand that there are circulation-policy and significant logistical details that must be worked out.

Q: Can my library customize the public Web view of the MSC catalog?

A: The MSC catalog is available to anyone, anywhere, anytime, through Internet access and a web browser. Our desire to customize the catalog to your library's unique needs and preferences is tempered by finite staff resources and the capabilities and limitations of the SirsiDynix *Symphony* software. Users with mobile devices can also access the catalog using the BookMyne application to search the catalog, place holds, view their online accounts, renew items and manage book lists.

The "e-Library" web interface (OPAC) is available to your users. Their friendly Amazon-like web interfaces include content (such as book jackets, table of contents, excerpts, and book reviews). This content is licensed from Syndetic Solutions, Inc., and your library's share of this consortium-wide cost is part of your ongoing expenses.

Some of the look-and-feel of the MSC system can be customized for your library; other aspects are determined by consortium-related requirements and cannot be changed to meet your library's needs.

Q: What data can I migrate from my existing system?

A: Bibliographic and item level data migrates well if it is in standard MARC format. Patron information can be migrated. Some libraries use this opportunity to re-register their patrons in the new system. Patron data in standard flat-text files from student-data or similar systems can usually be migrated. Circulation, serials control and acquisitions data is problematic to migrate and we do not attempt to migrate those types of data except for very large libraries or library groups.

Selected libraries will begin a three to six month process of adding their records to the MSC. This process will include testing and training timed to meet the needs of new libraries coming online. Within three to five months, selected libraries' catalogs will typically be available over the Web, and libraries will begin to circulate items using the MSC system.

Q: Can we use the MSC to build our bibliographic and patron data files?
We have no electronic data files; instead we use a card catalog.

A: Yes, the MSC is a great tool to use to create an electronic duplicate of your card catalog. We can help you estimate how long it might take to get the job done. Libraries not migrating bibliographic data are required to manually enter 80% of circulating collection no later than one year after joining the MSC.

Q: Why is a collection management policy required?

A: Collection management policies are a prerequisite to maintaining a useful collection. Accordingly, the Montana State Library Commission requires grant seeking libraries to have a current (less than 3 years since the last formal revision/update) collection management policy, approved by the library board/school board or principal or administrator, in place and on file at the Montana State Library.